

NC E-Procurement Overview

The NC E-Procurement @ Your Service system is an online purchasing system that can be accessed by users in North Carolina Agencies, Community Colleges, Local Education Authorities (LEAs), and local governments.

This service is a user-friendly, internet based purchasing system that offers cost savings and an efficient purchasing process to government users. This system is designed to enable users to complete a variety of E-Procurement functions based on an organization's business and job functions. The system brings together buyers and suppliers via the internet in order to make the traditional procurement process more efficient. It also provides users with a faster purchasing process, more purchasing options and easy access to catalogs, contracts and reports.

The NC E-Procurement Service integrates purchase order information to the financial systems of North Carolina State Agencies, Community Colleges, and Local Education Authorities (LEAs). All other government agencies will continue to use the NC E-Procurement System as **non-integrated**. Non-integrated agencies have access to create and issue purchase orders within E-Procurement, but will need to continue using their specific financial system to encumber the necessary monies. The NC E-Procurement Service provides access to online statewide term contracts, electronic approval flows, and eQuote (an electronic quoting tool).

E-Procurement Lifecycle for **Non-Integrated Agencies**:

1. In the beginning of the E-Procurement lifecycle, an eRequisition is created by the requestor and has a status of '**Composing**'.
2. Once the eRequisition is complete, it is '**Submitted**' for approval.
3. A designated approver(s) reviews the eRequisition.
4. A purchase order is then generated in the NC E-Procurement Service and the status is changed to '**Ordered**'.
Note: If the eRequisition is returned rather than approved, the status of the eRequisition changes to '**Returned**'.
5. The purchase order is electronically transmitted to the supplier(s) using their preferred ordering method chosen by the vendor in their Vendor Registration account.

1.0 Logging into NC E-Procurement @ Your Service

NC E-Procurement @ Your Service is an internet base purchasing system and can be accessed by users anywhere there is Internet access.

The URL for the NC E-Procurement Service is <https://buyer.ncgov.com/Ariba>

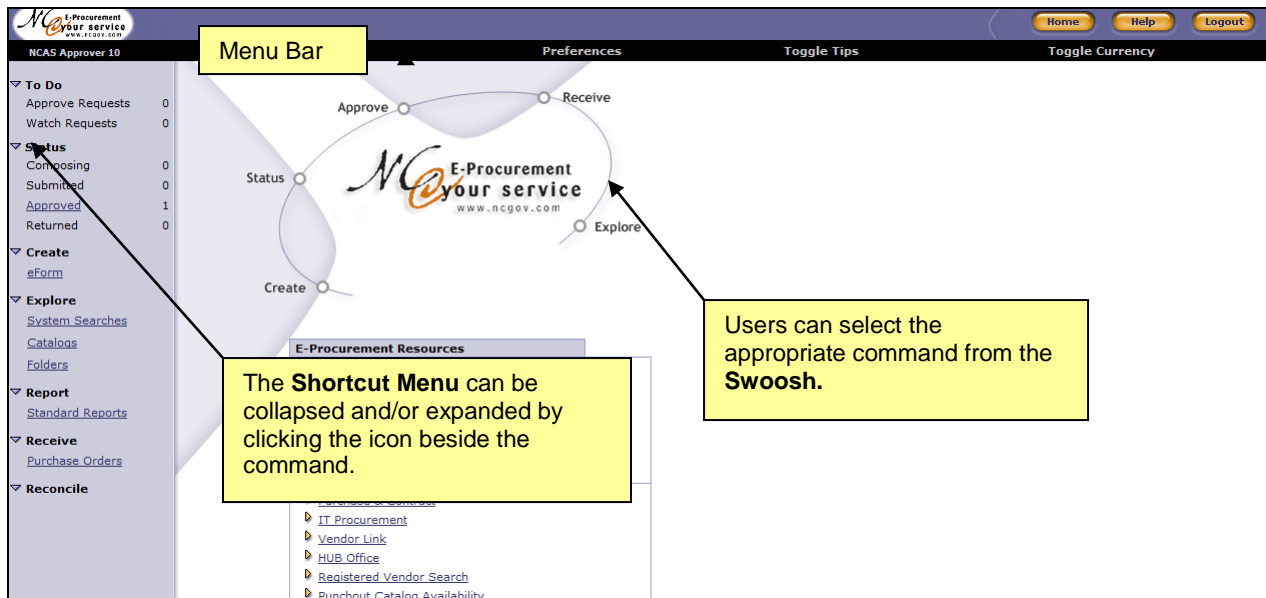


1. Enter the user name and password assigned by the NC E-Procurement Service team and click 'Login.'

Note: Each user is assigned a unique user name and password to log into the NC E-Procurement Service. Please work with the NC E-Procurement team to set up users for your specific agency.

Note: When logging into the NC E-Procurement Service, users will automatically be taken to the NC E-Procurement homepage. Alternatively, users can select a different page to be displayed using the 'Go to' dropdown box (e.g., Approval queue).

2.0 NC E-Procurement Home Page



The NC E-Procurement homepage allows users to select which E-Procurement task a user wishes to complete. The center of the page displays what is commonly referred to as the Swoosh. The Swoosh describes the basic E-Procurement cycle. It contains direct links for the user to access information at different phases of the cycle. The links are called commands. The following commands are displayed on the Swoosh: **Create**, **Status**, **Approve**, **Receive**, and **Explore**.

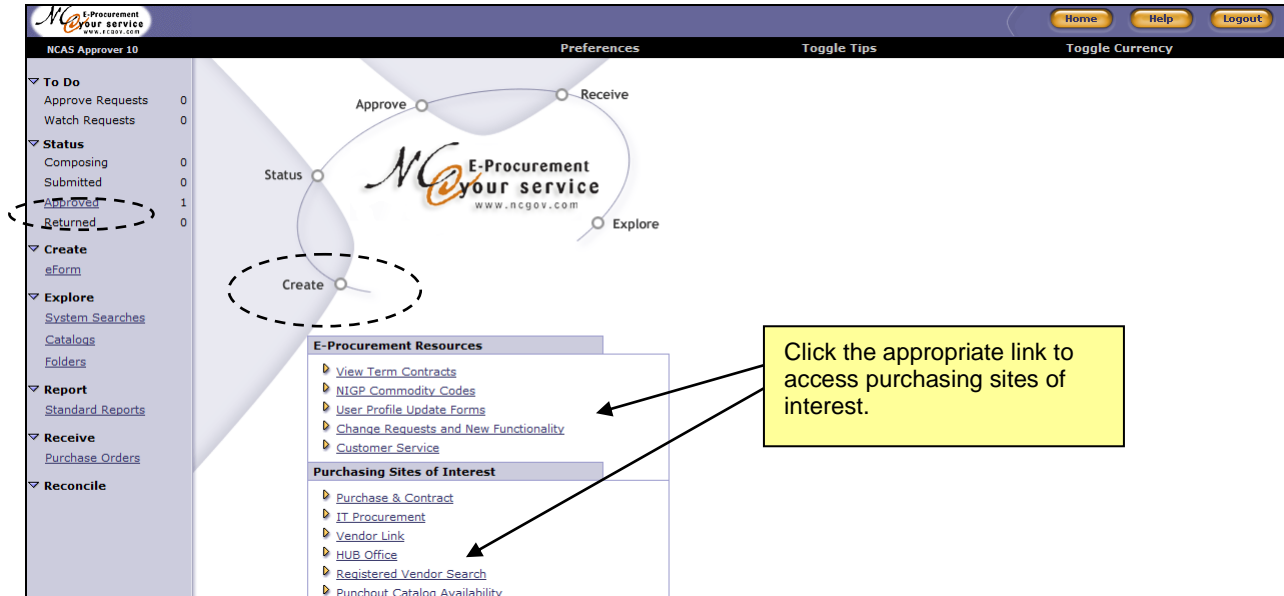
- **Create:** Allows users to create an eRequisition and eQuote.
- **Status:** Allows users to check the status of eRequisitions in progress.
- **Approve:** Allows users to review requests awaiting their approval.
- **Receive:** Allows users to acknowledge receipt of requested items (**Not available for non-integrated agencies**).
- **Explore:** Allows users to locate and organize eRequisitions and purchase orders.

The **Menu Bar** is displayed above the Swoosh on the E-Procurement homepage. The Menu Bar is displayed on all screens in the system. It provides direct access to the Home page. It also allows user to logout of the system, access preferences and turn on/off toggle tips.

Note: Toggle tips describe the general purpose of the screen. The Toggle Tips can be noted by the "i" (information) icon and the gray shading.

Another key component of the Home Page is the **Shortcut Menu**. The Shortcut Menu is located on the left sidebar of the website. It provides links for easy access to information. The links on the Shortcut Menu work as shortcuts to the main tasks performed in the system. If users click on a shortcut, they will go directly to that screen. On the Home Page, the Shortcut Menu also displays the status of each request. For example, if the user needs to approve items, the Shortcut Menu indicates the number of items that need approval in that folder.

3.0 Creating an eRequisition



An eRequisition is created when a user selects items to order over the Internet through NC E-Procurement @ Your Service. The user initiating the eRequisition is referred to as the requestor. A Shortcut Menu on the left hand side of the E-Procurement Home Page displays the required process steps as well as noting the user's progress. The user navigates through the process steps by either clicking the links in the Shortcut Menu or by using the navigational buttons at the top or bottom right of the screen. There are three main steps required to create an eRequisition:

1. **Add Title** – enter a title that describes the purchase
2. **Add items** – select and add items to the shopping cart
3. **Checkout** – enter shipping, accounting, and comment information, as well as review the eRequisition for accuracy

The Home Page, shown above, is the first page displayed once a user logs into the NC E-Procurement System. This page is also referred to as the Swoosh page. To begin an eRequisition, click the '**Create**' button on the Swoosh or the '**Create**' link in the Shortcut Menu.

A. Add Title

The Add Title page is the first step in creating an eRequisition. It allows the user to name the eRequisition for future reference.

The screenshot displays the 'Add Title' page for creating an eRequisition. The interface includes a top navigation bar with 'Home', 'Help', and 'Logout' buttons. Below this is a header area with 'Eproc Admin 1', 'Preferences', 'Toggle Tips', and 'Toggle Currency'. The main content area is titled 'PR5875120: Untitled eRequisition' and shows 'Items: 0' and 'Total: \$0.00USD'. A sidebar on the left contains a 'Shortcut Menu' with three steps: '1 Add Title' (highlighted), '2 Add Items', and '3 Checkout'. The main form area has the following fields: 'Title' (with 'Untitled eRequisition' entered), 'On Behalf Of' (a dropdown menu showing 'Eproc Admin 1'), 'Delay Purchase Until: ?' (a date picker), 'Legacy Document ID' (a text field), and 'Transmit To Supplier?' (a checked checkbox). A 'Next >' button is located at the bottom right of the form area. A yellow callout box points to the 'Add Title' step in the sidebar, stating: 'The Shortcut Menu indicates the current step in the eRequisition and can be used to navigate through the eRequisitioning process.'

1. **Title** -- The title of the eRequisition should be descriptive of the item(s) being purchased.
 2. **On Behalf Of** -- The 'On Behalf Of' field will default to the requestor's login token. To create an eRequisition on behalf of another user, locate the user's name in the dropdown box.
- Note:** If the user's name does not appear in the dropdown box, choose '**Other...**' to select the appropriate user.
3. **Delay Purchase Until** -- The 'Delay Purchase Until?' field allows the eRequisition to be submitted and approved but not be distributed to the supplier until the date specified.
 4. **Legacy Document ID** -- The Legacy Document ID is a text field. The purchase order number from the user's legacy system is entered in this field. This will allow users to match purchase orders created in their financial systems to the purchase orders created within the NC E-Procurement Service. This field is required.
 5. **Transmit To Supplier** -- The 'Transmit to Supplier' box defaults to checked. The vendor **will not** receive a copy of the purchase order if this field is not checked.
 6. Click the '**Next**' button to continue to the next step in creating an eRequisition.

B. Add Items

Users must choose what type of line item they would like to add to their eRequisition. There are four types of items that can be added to the eRequisition: catalog, non-catalog, punchout, and eQuote. Below is a brief description of each line item type.

A. Catalog Item – A catalog item is a statewide term contract item that has been loaded into the NC E-Procurement online catalog. Catalog items contain the description, vendor, price, and commodity code information from the appropriate statewide term contract.

B. Non-Catalog Item – A non-catalog item is an item that is not on statewide term contract. Users must enter the item description, vendor, price, and commodity code information for these type items.

C. Punchout – A punchout site is a website created and maintained by the supplier specifically for the State of North Carolina. This allows buyers to punchout, or leave, the system to view term contract item(s) on the supplier's website. This is similar to shopping on the supplier's website, however, users access the specific site through the NC E-Procurement System.

D. eQuote – eQuote is an electronic quoting tool available to users within the NC E-Procurement Service. Users enter the specifications for the quote and send the quote to suppliers electronically with a single click.

i. Catalog Items

The screenshot displays the 'Add Items' interface within the NC E-Procurement system. At the top, there's a navigation bar with links for Home, Help, and Logout. Below this, a header section includes 'Eproc Admin 1', 'Preferences', 'Toggle Tips', and 'Toggle Currency'. The main content area is titled 'eRequisition' and shows 'PR5875120: Untitled eRequisition' with 'Items: 0' and 'Total: \$0.00USD'. A sidebar on the left lists steps: 1. Add Title, 2. Add Items (highlighted), and 3. Checkout. The main area features a search bar with 'Keywords', 'Search', 'Reset', and 'Options' buttons, along with a 'Create Non-Catalog Item' button. Below the search bar, it indicates '54,796 items found' and a 'View By: Category' dropdown. The items are listed in a grid format, categorized into groups such as 'AGRICULTURAL EQUIPMENT, SUPPLIES & CHEMICALS (343)', 'BUILDING MATERIALS, MAINTENANCE (11466)', 'EDUCATIONAL & ATHLETIC EQUIPMENT, SUPPLIES (482)', 'FURNITURE (OFFICE, EDUCATIONAL AND HEALTH CARE) (5748)', 'MACHINES, TOOLS, MATERIAL HANDLING (3749)', 'APPLIANCES, ELECTRICAL, CLOCKS (10850)', 'CLOTHING & TEXTILE ITEMS (1263)', 'FOOD & RELATED ITEMS (1831)', 'HIGHWAY CONSTRUCTION EQUIPMENT, GROUNDS (4166)', and 'MEDICAL & LAB EQUIPMENT & SUPPLIES (7293)'. Each category has a list of sub-items with their respective counts.

1. **Keywords** – Allows the user to type in key words that describe the item they wish to purchase into the search field. The system will then search through all the contracted items and display the items similar to the keyword search. The keyword search is intended to be the most frequently used search.
2. **Options** –Allows users to customize the search function by selecting additional fields to include in the search:
 - **Keywords:** Choose to match the keyword(s) entered by the exact phrase or exact words.
 - **Additional Options:** Select the desired field and enter the search criteria. Available options include: Supplier, Supplier Part #, Manufacturer, Mfg. Part #, Price, and ETA (Days).
 - **Custom:** Users can choose to save certain catalog items in their favorites list for a quick reference in the future. Choose the 'Favorites' link to view the list of items saved in the favorites list.
 - **Views:** Select to show or hide all available search options.
 - **Saved Searches:** Users can choose to save catalog searches for quick reference. Run a saved search by clicking the name of the search previously saved. To save a new search, choose 'Other'.
3. **Browsing the Catalog** – Allows the user to manually drill through the National Institute of Government Purchasing (NIGP) commodity code structure to find a desired item. Click on the appropriate header (or detailed) link to view a list of the items in a particular category.

The screenshot displays the 'eRequisition' interface. On the left is a sidebar with a shopping cart icon and three numbered steps: 1. Add Title, 2. Add Items (highlighted), and 3. Checkout. The main header shows 'PRDEV1000402: Untitled eRequisition' with 'Items: 1' and 'Total: \$746.86USD'. Navigation buttons '< Prev', 'Next >', and 'Exit' are in the top right. A yellow callout box points to the 'View By' dropdown menu, stating: 'Sort the results using the 'View By' drop down box.' The search bar contains 'Keywords:' with 'Search', 'Reset', and 'Options' buttons. Below the search bar, it says '12 items found'. A breadcrumb trail reads: '3 items found in: EDUCATIONAL & ATHLETIC EQUIPMENT, SUPPLIES > EDUCATIONAL EQUIPMENT AND SUPPLIES > 785-00: SCHOOL EQUIPMENT AND SUPPLIES > 785-55: Engineering and Technical Instruction Equipment and Materials (For Air Conditioning, Electronics, Machine Shop, etc.)'. Three items are listed, each with an 'Add to Cart' button circled in a dashed line. The first item is '(Statewide, Recycled, Good, Regular) Test item 1.' by 'AFP INDUSTRIES, INC.' for \$698.00USD. The second is '(IT Convenience, non-Recycled, Service, Regular, ...)' by 'AFP INDUSTRIES, INC.' for \$10.48USD. The third is '(Agency Specific, non-Recycled, Good, Base) Test ...' by 'AFP INDUSTRIES, INC.' for \$116.88USD. A yellow callout box points to the 'Supplier' link in the first item, stating: 'Click the 'Supplier' link to view detailed information about the selected supplier.'

4. When a user executes a catalog search, a list of items is returned. The default display of results is based on relevance. Search results can also be viewed by: category, supplier, or price.

5. Click the '**Add to Cart**' button to add the item to the shopping cart.

Note: Users can customize the search results by selecting the appropriate view in the 'View By:' and 'with' dropdown boxes. Search results can be displayed with detailed or summary information. Users can also view results using 'Details (multi)' or 'Summary (multi)' which allows multiple line items to be added to the shopping cart at once.

ii. Non-Catalog Items

Ariba Spend Management™

Thomas Woods Preferences Toggle Tips Toggle Currency

Shopping Cart PR249: Untitled Requisition
Items: 1 Total: \$449.98USD

2 Add Items Click the 'Create Non-Catalog Item' button.

Add items to your requisition from the catalog or also enter details for non-catalog items. [How To](#)

Keywords: Search Reset Options ▾ **Create Non-Catalog Item**

1,506 items found View By: Category ▾

Computers (617)
Desktop (13) Laptop (6) Server (1) ...

Manufacturing (266)
Electrical (61) Equipment (2) Hand Tools (14) ...

Miscellaneous (63)
Clothes (4) Agricultural Machinery (59)

Office Equipment/Supplies (358)
Office Equipment (53) Office Supplies (249) Electrical and Lighting components (56)

Reference Materials (796)
Reference Books (398) Publications (398)

Maintenance Services (3)
Cleaning Services (3)

Print (2)
Business Cards (2)

Uncategorized Items (4)

Can't find what you are looking for? Fill out a [non-catalog form](#).

< Prev Next > Exit

1. Click the 'Create Non-Catalog Item' button to enter non-catalog item information.

2. **Full Description:** Enter a description of the item being purchased. Be sure to enter as much detail as necessary for the supplier to accurately fulfill the item (e.g., supplier part number).
3. **Commodity Code:** Locate the appropriate commodity code that describes the item being purchased by using the dropdown box. If a desired commodity code is not listed in the dropdown box, select 'Other...' to search for the appropriate code.

Note: It is important to select the appropriate commodity code as the State of North Carolina uses this for reporting purposes. Commodity codes that begin with a "9" describe service type commodities. These codes should not be used when purchasing goods.

4. **Supplier:** Locate the supplier in the dropdown box. If the supplier is not listed in the dropdown box, choose 'Other...' to search for the appropriate supplier.
5. **Location:** If the default location is not the appropriate one, click on 'Select' and choose the appropriate location.
6. **Supplier Part #:** Enter the appropriate supplier part number. This will assist in getting the correct item.
7. **Recycled Content:** Select the appropriate radio button to reflect if the item contains recycled products.
8. **Item Classification:** Select the appropriate radio button to reflect if the item is Good or Service.
9. **Contract:** Select the appropriate contract type if the item is on contract.
10. **Blanket Purchase:** Select the appropriate radio button to reflect if the item is blanket.
11. **Quantity:** Enter the appropriate quantity.
12. **Unit of Measure:** Locate the appropriate unit of measure in the dropdown box. If the desired unit of measure is not listed in the dropdown box, choose 'Other...'

13. **Price:** Enter the price of the item.
14. **Tax Rate:** Enter the tax rate for the item being purchased. If no taxes should be applied to the item, select '**Other.**'
15. **Tax Amount:** This field automatically calculates based on the selected tax rate. Users may enter a specific tax amount in this field when the tax rate of 'Other' is selected.
16. **Other Costs:** Enter any other costs involved in this field. Do **not** enter shipping/freight charges in the 'Other Costs' field.

Note: Shipping/Freight charges should be included as a separate line item using the freight commodity code, '962-86 – Services: Transportation of Goods (Freight).' This will prevent the supplier from being charged the 1.75% marketing fee for this service.
17. **Amount:** This field is automatically calculated based on the information entered above.
18. Click '**OK.**'

iii. Punchout Items

The screenshot shows the 'Add Items' page in the NC E-Procurement system. The page title is 'PR82A225: Untitled eRequisition'. The left sidebar shows a navigation menu with 'Add Title', 'Add Items' (selected), and 'Checkout'. The main content area has a search bar with 'punchout' entered. Below the search bar, it says '1 items found'. The search results show one item: 'VWR Scientific (Punchout Catalog) - 493A ...'. A dashed circle highlights the 'Shop Supplier Catalog' button next to the item name. The page also includes a 'Create Non-Catalog Item' button and a 'Can't find what you are looking for? Fill out a non-catalog form.' message.

1. Conduct a catalog search for the supplier's punchout site.

Note: Users can search using the phrase 'punchout' to view all available punchout sites.

2. Click the '**Shop Supplier Catalog**' button to access the supplier's punchout website.

Note: Some supplier punchout sites may be blocked if the user's internet browser security settings are set too high. Please check with your agency's IT department before making any security setting changes.

Note: The individual suppliers maintain their own **Supplier punchout sites**. NC E-Procurement maintains a list of current punchout sites and their availability. This list can be found on the NC E-Procurement @ Your Service website by following the below link: http://eprocurement.nc.gov/Buyer/Punchout_Catalog_Status.html. If a supplier's punchout site is unavailable, NC E-Procurement Service will update this page with ordering instructions for the particular vendor.

Since individual suppliers maintain their own punchout sites, each site may differ in appearance and navigation; however, the same basic logic is used to navigate each site. When shopping on a punchout site, users will add the desired items to the shopping cart and 'Submit' the shopping cart back to E-Procurement. Once the checkout process is complete on the punchout site, the items will appear on the E-Procurement eRequisition.

Note: To make changes to line items from a punchout site, the user must return to the supplier's punchout site. To do so, click on the description of one of the listed line items.

iv. eQuote Items

eQuote is a tool within NC E-Procurement @ Your Service that can be used to solicit and review quotes from multiple suppliers for a good and service. The tool is used for open market purchases that do not require the creation of a Request for Proposal (RFP) in the Interactive Purchasing System (IPS).

eQuote is recommended in the following situations:

- The item is not listed on term contract and is less than your entity's delegation amount
- The item is a high dollar or high volume term contract item under your entity's delegation amount
- A rush order is needed (response within 4 hours)
- Competitive quotes from 3 or more suppliers are needed.

1. Please see the **eQuote Process Guide** for additional information regarding eQuote functionality.

C. Checkout

The Checkout page allows the user to enter shipping and comment information, as well as review the eRequisition for accuracy. The approval flow for the eRequisition can be viewed from the Approval Tab on the Checkout page as well.

The screenshot shows the 'Checkout' page for a requisition titled 'Untitled Requisition' (PR249). The page has a left sidebar with a 'Shopping Cart' link and a main content area. Annotations include:

- A yellow box pointing to the 'Shopping Cart' link in the sidebar: "View the shopping cart by clicking the 'Shopping Cart' link."
- A yellow box pointing to the 'Approval Flow' tab: "View the system generated approval flow by clicking the Approval Flow tab."
- A yellow box pointing to the 'Edit', 'Copy', and 'Delete' buttons for a line item: "Edit, copy, or delete by selecting the line item(s) and clicking the appropriate button."

The 'Line Items' table shows one item: a Canon PC940 Copier. Below the table, there is a warning message: "The line item contains one or more invalid fields". The supplier is listed as Maverick's Surf Shop, and the contact is Andrea Coor at SUNNYVALE. The total cost is \$449.98USD.

No.	Type	Description	Qty	Unit	Price	Amount
1		Canon PC940 Copier	1	each	\$449.98USD	\$449.98USD

Supplier: [Maverick's Surf Shop](#)
Contact: [Andrea Coor](#) : [SUNNYVALE](#)
Commodity Code: [Photocopiers](#)

The revolutionary PC940 has high capacity, speed and advanced zoom features you'll really appreciate. Equipped with a 250- sheet paper cassette and legal-size capability, the PC940 is suitable for high-volume productivity. It also features a rapid 13 copies-per-minute speed and a preset reduction/enlargement zoom capability, making the PC940 the ideal copier for handling all your large copy jobs.

Buttons: Edit, Copy, Delete, Add items

Total Cost: \$449.98USD

1. **Line Items** -- Review the eRequisition line items on the 'Checkout' page before submitting the eRequisition. Edit, copy, and/or delete existing line items directly from this page by placing a checkmark beside the line item and clicking the appropriate button. To add additional line items to the eRequisition, click the '**Add Items**' button.

Note: Click the '**Hide Details**' link to customize the amount of detailed information that is displayed on the Checkout screen.

2. **Shipping – Entire eRequisition** – Shipping information entered will default to all line items entered on the eRequisition.

- **Ship To:** The 'Ship To' field automatically defaults to the Ship To location in the user's profile. To select a different ship to address click the dropdown box and choose the desired address. If the address name is not listed in the dropdown box, choose 'Other' for a complete list of addresses available for the entity.
- **Deliver To:** The 'Deliver To' field defaults to the user's name. To enter another name or department name do so in this free text field.
- **Need-by Date:** The 'Need-by Date' is transmitted to the vendor on the purchase order as the date that the items need to be delivered. Use the calendar icon to select the appropriate date.
- **Shipping Method:** The 'Shipping Method' field defaults to 'Best Way'. Use the dropdown box to choose the appropriate shipping method for the eRequisition.
- **FOB Code:** The Freight on Board (FOB) Code reflects how freight charges for the order are paid. Select the option meeting the user's agency purchasing policies.
- **Terms of Payment:** The 'Terms of Payment' field determines the timelines and conditions of payment to the vendor.

Shipping - Entire eRequisition

Ship To: 63

Deliver To: CORR Requestor 01

Need-by Date: ?

Shipping Method: BEST WAY

*FOB Code: 001

*Terms of Payment: N30

Comments - Entire eRequisition

Comments:

Selecting the checkbox will send comments to your integrated backend system and place them on the purchase order.

☐ include comment and/or attachments on purchase orders

Add Attachment Delete

* indicates required field

Prev Submit Exit

Select the checkbox to include comments and/or attachments on the purchase order.

The following types of attachments are supported: HTML, PDF, TIFF, Postscript, Word, Excel and PowerPoint.

3. **Comments – Entire eRequisition** – Enter header comments and/or attachments necessary to complete the eRequisition. To include a comment and/or attachment with the purchase order, select the checkbox beside, **‘include comment and/or attachment(s) on purchase orders.’**
4. **Approval Flow** – Review the system generated approval flow by clicking the Approval Flow tab. (See the ‘Approval Flow’ process guide for additional information).
5. **Submit** - To submit the eRequisition to the approval flow, click the **‘Submit’** button either at the top or bottom of the page.